EXCEED RTI® Quick Start Card - Educator Dashboard

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1. Search for any student by typing in the student's name or student ID number
2. Students are automatically loaded to the student panel based on educator access. The red and green arrows in the Progress column indicate: green = making adequate progress, yellow = needs more improvement, or red = struggling
3. Mouse hovering over a student's name reveals the student options menu which allows the user to perform any of the actions on this menu by selecting it from the list.
4. The To Do list is a list of all actions to be completed. These are automatically generated by EXCEED from different sources and have due dates, but can be completed at any time prior. Tasks can be added to the list via the add task icon
5. The Early Warning section displays those students who are currently on an intervention plan in EXCEED and are struggling.
6. The Intervention Logging panel displays interventions due and by date; click each line to open data entry fields
7. The Progress Monitoring panel displays progress monitoring probes due, by date; click each line to open data entry fields; scores may be imported into EXCEED – in this case, the user only need to view/verify the data
8. The Quicklinks allow the user quick access to data. Access this data by clicking on the desired link.
9. Numbers to the side of the of the panels indicate how many items are contained in each panel.
10. Quickly search your student list by using the "Filter by" function.
11. Use the filter feature next to the title of the student list to filter your student list by different criteria.

FYI: The Dashboard and Logout buttons are available throughout the application, and are determined by user rights. Always use the Logout button in order to completely log out of EXCEED.

EXCEED RTI® Quick Start Card – Coordinator Dashboard

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1. The Coordinator Dashboard has expanded search functionality. Those with this view of the dashboard may choose from many different options to search for students.
2. Students are automatically loaded to the student panel based on educator access. The red and green arrows in the Progress column indicate: green = making adequate progress, yellow = needs more improvement, or red = struggling
3. Mouse hovering over a student's name reveals the student options menu which allows the user to perform any of the actions on this menu by selecting it from the list.
4. The To Do list is a list of all actions to be completed. These are automatically generated by EXCEED from different sources and have due dates, but can be completed at any time prior. Tasks can be added to the list via the add task icon
5. The Early Warning section displays those students who are currently on an intervention plan in EXCEED and are struggling.
6. The RTI Snapshot panel gives an overview of Intervention plans by Tier, who is struggling and who is successfully progressing towards their goals. Click on the number in the appropriate bar to display the students in the student list.
7. The Quicklinks allow the user quick access to data. Access this data by clicking on the desired link.
8. Numbers to the side of the of the panels indicate how many items are contained in each panel.
9. Quickly search your student list by using the "Filter by" function.
10. Use the filter feature next to the title of the student list to filter your student list by different criteria.

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EXCEED RTI® Quick Start Card - Intervention Plan-Goals

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1. These tabs appear once you have saved a plan - if you have chosen to use a plan template, goals will be pre-selected,but can be changed for this student. Domain is pre-filled on this page
2. If adding goals, select the appropriate goal bank
3. Select appropriate grade level
4. Select Area of Concern - holding ctrl will allow multi-select - goals from these Areas of Concern will automatically appear.
5. Filter goals by typing in first words to narrow the search
6. Checking the goal will automatically select goal and place in Selected Goals panel
7. Selected goals are listed, highlighted goals have already been defined - goals can be deleted from list
8. Click on Add Selected Goals to be advanced to the next screen.

1. Dark circle = progress monitoring not defined, Green M = progress monitoring defined
2. Customize goal text for student needs
3. Select appropriate measure
4. Enter baseline and target for selected measure - growth will automatically calculate - will color code if #5 is defined
5. Norms and Cut Scores will appear if defined for selected measure
6. Select frequency of progress monitoring - will activate on dashboard when scheduled
7. Select to inactivate this goal
8. Dates will be automatically generated, but are editable if necessary
9. Once complete, click Save Goal in lower right of screen

1. To add an intervention, click Add Intervention
2. Choose desired strategy - Individual or Custom
3. Choose intervention type from dropdown
4. Select desired intervention - intervention name will pre-populate on the right - use lookup icon to find primary staff
5. Dates will pre-populate from plan, enter start time, duration, and frequency of delivery
6. Select yes if intervention logging is desired and create a schedule for logging, or:
7. Copy the delivery schedule for logging
8. Click Save Intervention to save this plan

1. Once the plan is completed, click the summary tab to see a read-only summary of entire plan.
2. Click the Create Plan Template in lower right corner to use the goals, progress monitoring measures, interventions, and schedules for other students with similar needs

1. To end an intervention plan and rate its effectiveness, click the Rate & End Plan Tab
2. Indicate whether the plan was effective, provide a rating of the plan's effectiveness (hovering over a star will provide its scale value), and rate the fidelity with which this plan was provided
3. Add any additional comments about plan effectiveness, ease of use, and student responsiveness - include Timestamp on note if desired

EXCEED RTI® Quick Start Card – Student Record/Events

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1. Select the left vertical bar to close the student panel, giving more space for the student record information
2. Select and click a student name to replace the dashboard with the student record panels
3. Student data is imported into EXCEED from the district SIS - the highlighted link (left 3) changes the center panel (center 3)
4. Data about the students are plotted on the graphs within EXCEED RTI; click on Growth or Monitoring to view the graphs
5. Select the Events link to access all the events (historical, present, or future planned) for the student

1. Current and future events/meetings are listed in the upper panel; the event with the earliest due date appears at the top
2. Clicking on an event gives access to the Meeting Manager - where forms are completed and plans are constructed
3. Any event listed in red is overdue
4. Historical events are listed in the lower panel; these events can be reviewed; however, these events are locked and data cannot be changed
5. Permissions determine who can add an event to the student record; click the Schedule a New Meeting icon to add a new meeting

EXCEED RTI® Quick Start Card – Progress Monitoring

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E**X**CEED Student Achievement Manager
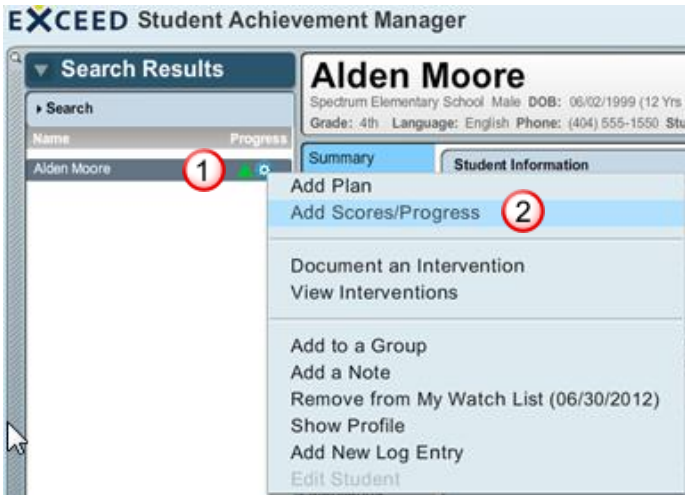
1. From the dashboard, hover over a student's name and click the Student Options icon to pull up the menu
2. From this menu, you can select to add a note to the student's record, add the student to a group, add intervention logging information (if available), add the student to your watch list, add/edit an intervention plan, or add progress monitoring data - select Add Scores/Progress

3. After selecting Add Scores/Progress, the Progress Monitoring management panel will appear with Active Measures automatically selected
4. You can update/edit an existing score on the left hand panel by clicking on the item - scores can be deleted with the X
5. You can add a new assessment score by selecting one of the existing Domains on the right, and then selecting the appropriate measure
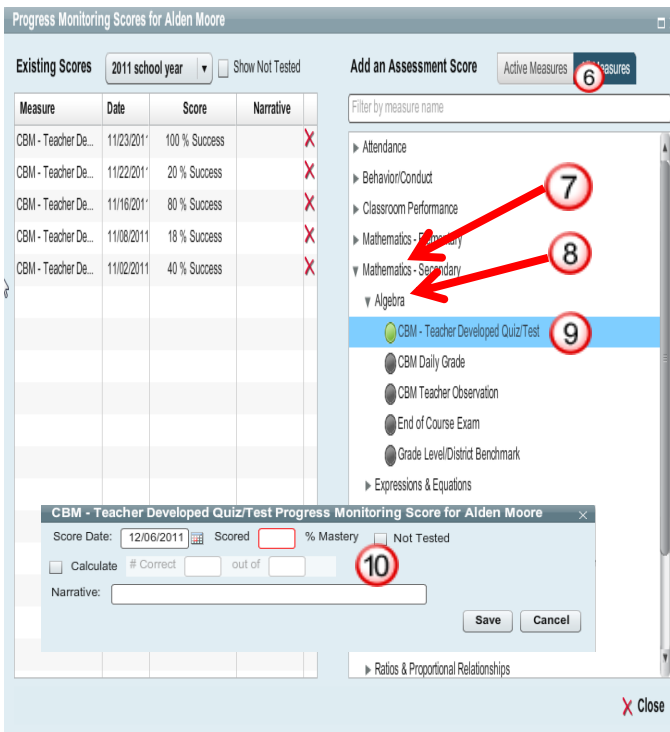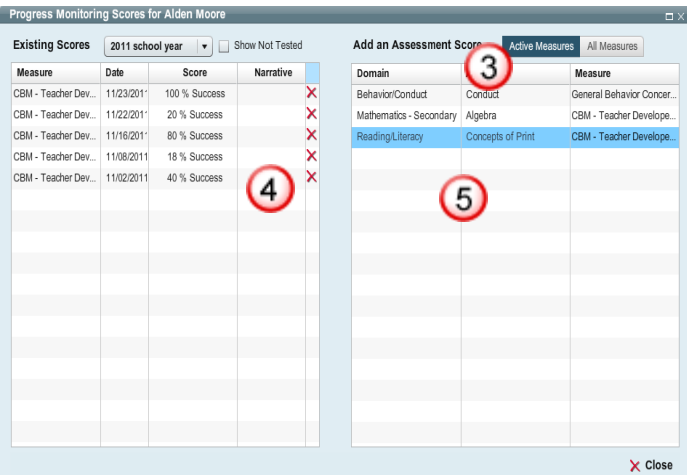
6. You can choose to add an assessment score from a previously unselected domain by clicking on All Measures
7. Select the desired domain
8. Select the desired Area of Concern
9. Select the progress monitoring assessment tool that was used with the student
10. Once you have selected the appropriate measure, an additional panel will appear and allow you to input the appropriate score, and date of measure - if calculations need to be made, check the Calculate box

EXCEED RTI® Quick Start Card – Events – Meeting Manager

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The Meeting Manager is accessed by clicking on the student's name to display the student's profile. From within the student's profile, click on Events. When the events are displayed, click on the meeting manager icon

1. The event opens with the electronic forms appearing first. To the left you will see Event Sections. All available forms will be accessible from this list. Click on the appropriate Event Section to access the appropriate form. You may want to complete forms first or add/review a plan first - do what makes sense and follows you district processes .
2. Forms will be tabbed across the top of the screen. Simply click on the desired tab to take you to the desired form.
3. Meeting forms are color coded: Green = pre-filled
4. Meeting forms are color coded: Pink = required for compliance
5. Meeting forms are color coded: Yellow = optional
6. Select the appropriate plan to review a current plan that the student is on. These will be listed in the Plan panel. If you need to create a new plan, click on the Add a Plan button at the bottom of the screen.
7. Click Student Profile to review the data imported from the SIS or the student performance graphs - this information is read-only and cannot be changed
8. Click the Summary button to view a summary of the student's RTI plans
9. Click the Notes button to add any additional information to this meeting record
10. At the bottom of the screen, you can print the forms, save the forms (and check compliance), or if the meeting is complete, you can lock the meeting.